



Reaching Across Illinois Library System

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November 10, 2017

TO: RAILS Board of Directors
FROM: RAILS staff
ABOUT: RAILS service and operations report—November 2017

Major sections in this report correspond to the goals in the RAILS strategic plan (<https://www.railslibraries.info/about/strategic-plan>).

Resource Sharing

Delivery

- The next delivery fine count is scheduled for November 13–17, 2017.
- Since 2014, RAILS staff have been working on a project to produce delivery labels from various integrated systems (ILSs). An early beta project with SWAN staff and a staff member at Oak Lawn Public Library was successful at a few SWAN libraries, but the complexities of different integrated library systems, different ILS configurations, and different receipt printers thwarted multiple efforts to generalize the label printing software so that it could be used by many RAILS libraries. (See the attached report for a full summary of this project.) Consequently, RAILS has discontinued work on software development for this project. However, if libraries or consortia are interested in doing software development for printing delivery labels from their own ILS, Mark Hatch (RAILS Delivery and Facilities Director) can provide delivery label specifications and verify that the labels generated meet delivery requirements.

E-book Projects

- See the attached report for eRead Illinois Axis 360 statistics.
- Live and webinar trainings are listed at <http://www.librarylearning.info> when available.

Group Purchases and Discounts

- On October 25 and October 26, RAILS hosted demonstrations of SkyRiver. SkyRiver is a full-service bibliographic utility for cataloging from Innovative Interfaces, Inc. For both days, a total of 55 RAILS member staff attended either in-person at the Burr Ridge service center or via online streaming. RAILS Resource Sharing staff are working on negotiating a discount for SkyRiver for RAILS members.
- On November 10, RAILS hosted a pre-demonstration webinar of OpenAthens for six RAILS members. RAILS Resource Sharing staff will use this pre-demonstration to get feedback from the academic and public library community on the product. OpenAthens allows users to access multiple electronic resources without needing separate usernames and passwords for each individual vendor. Instead, each user has a common username and password that allows access to multiple vendors and resources.

LLSAPs and Other Consortia

- On November 10, RAILS held its second in-service day for consortial staff at Waubensee Community College in Sugar Grove. Forty-three staff members from seven consortia (CCS, I-Share, MAGIC, Pinnacle, PrairieCat, RSA, and SWAN) registered. Michelle Bradley, Member Engagement Manager for Midwest Collaborative for Library Services (MCLS) in Michigan, spoke on member engagement in the morning, followed by talk tables on various topics in the afternoon. This event grew out of previous in-service days held for just LLSAP staff.
- Veronda Pitchford, RAILS Director of Membership Development and Resource Sharing presented on the BiblioBoard platform and upcoming RAILS statewide museum pass program at the PrairieCat Delegates Meeting on October 25.

Member Engagement

Communications

- Approximately 196 school library staff members visited the RAILS exhibit booth at the Illinois School Library Media Association (ISLMA) conference on October 20 and 21. RAILS staff enjoyed talking in-depth with booth visitors about the different programs/services RAILS offers for schools. The products available through the RAILS BiblioBoard platform were of special interest.
- RAILS had an exhibit table on the evening of October 26 at the Health Science Librarians of Illinois (HSLI) conference in Bloomington. Brian Smith and Nikki Zimmermann talked with 39 attendees (out of approximately 53 total) about RAILS programs/services of interest to those working in health science libraries. Nikki also gave a brief talk about RAILS to all attendees on October 27.
- So far, RAILS has sent over 400 copies of the new booklet on RAILS services to member libraries for use by library staff and trustees. The availability of the booklet was publicized in a recent *RAILS E-News*. If you would like copies to share with the other trustees at your library, contact Nikki Zimmermann at nicole.zimmermann@railslibraries.info.

Membership Changes and Issues

- The RAILS staff team working on membership standards beta testing is finalizing the initial version of the checklist. Beta testing is expected to begin in mid-November. Over fifty libraries in RAILS and IHLS have volunteered to participate in the test.

Multitype Collaborative Grants

- The application deadline for the first round of FY2018 multitype collaborative grants is November 17, 2017. There will also be a second award period with an application deadline of April 20, 2018. Details are available on the RAILS website at <https://www.railslibraries.info/services/multitype-grants>.

Member Visits

- See the attached report for statistics on member visits during October 2017.

Continuing Education and Consulting Services

Continuing Education

- See the attached report for statistics on recent RAILS continuing education events.
- CE planning for winter/spring continues, with planned topics for January through May including livestreaming for libraries, instructional design, customer service, trustee training, coaching and employee development, and budgeting/levies.

- The three-day preservation workshop that was tentatively scheduled for late July 2018 has been suspended due to a shift in fiscal year priorities at the Digital Preservation and Outreach Education (DPOE) department of the Library of Congress. RAILS staff may revisit planning for this workshop in FY2019 should it again be offered by DPOE.
- Upcoming CE opportunities include a FOIA presentation on December 4, a webinar on providing legal services for immigrant communities on December 6, and a Management Association webinar on designing training on December 12.

Consulting

- In the months ahead, RAILS staff will work to further promote the RAILS consulting directory (available at <https://www.railslibraries.info/services/consulting-directory>). Members will also be encouraged to provide recommendations for consultants to include.

Leadership and Innovation

- On November 7, Veronda Pitchford presented at *BiblioSummit Cities + Libraries* in Charleston, South Carolina during the panel on “How Libraries Are Thriving in the Digital Age.”

Organizational Excellence

Human Resources

- RAILS had no new hires or terminations since the October 2017 operations report. (Terminations refer to all persons leaving RAILS employment for any reason, including resignations and retirements.)
- RAILS expects to fill two part-time membership engagement positions before the end of November.
- The job description for the Technology Special Projects Coordinator position has been finalized. Major responsibilities include assisting with the overlay project, RAILS projects requiring authentication by or integration with integrated library systems, and other projects as assigned. This position has been budgeted for some time, but left unfilled in FY2017 due to the lack of a state budget.

Information Technology

- RAILS IT staff have been cleaning out unused items from the IT area and the server room to make room for future projects.
- Security cameras have been upgraded at Burr Ridge to provide better coverage and higher quality video. Planning is underway to upgrade the cameras at RAILS Bolingbrook as well.

Professional Development

- RAILS has contracted with DePaul University to offer a two-day workshop on facilitation skills for up to twenty RAILS staff members. These workshops will take place during January and February. This training will focus on facilitation skills that are routinely needed in work with both RAILS staff and members. Facilitation has been a service requested in the past by member libraries, and RAILS will evaluate whether facilitation could evolve into a service offered at the system level.

Administration and Finance

- Jim Kregor, as Treasurer, attended the Libraries of Illinois Risk Agency (LIRA) full membership meeting held on November 8 in Rolling Meadows.
- Outside auditors have completed their audits of all LLSAPs. MAGIC’s and PrairieCat’s annual financial reports were issued, and those for SWAN and RSA LLP are nearing completion.

ILS-Generated Delivery Labels Project Summary

November 2017

The project to generate delivery labels from integrated library systems (ILSs) was conceived in 2014 with the following goals:

- Increase accuracy and efficiency across the delivery system by automating transit label production at the library level
 - Current RAILS delivery labels require that library staff handwrite delivery codes. Handwritten labels are error-prone and often illegible, which can lead to inaccurate sorting by delivery providers. Testing libraries found that using automated labels saved significant staff time.
 - RAILS delivery providers could potentially further automate and expedite sorting with a barcoded label.
- Produce labels that meet the statewide delivery standards released by the Illinois State Library Delivery Advisory Committee in April 2014

This began as a partnership with SWAN staff to develop an ILS-generated delivery label solution and generate proof of concept. To inform this work, RAILS technology and delivery staff developed draft specifications for label design and printing based on statewide delivery labeling recommendations, delivery system needs, and library staff and patron needs. Since then, RAILS has pursued several avenues of consortial collaboration and software development, investing considerable staff and financial resources. The experiment has been met with technical and scale issues at each phase that challenged the feasibility of continuing.

Collaboration with SWAN

Millennium Pilot

- SWAN staff developed a solution that used print templates in Innovative's Millennium ILS, and printed as a transit slip on sticky receipt paper. This solution was deployed successfully to two SWAN libraries (Oak Lawn and Melrose Park).
- This early pilot concluded when SWAN migrated to SirsiDynix's Symphony platform, as Symphony does not have the same native capability to produce these labels.

John Huber & Associates / Rasmussen development (\$7,300)

- Leading up to SWAN's migration, RAILS worked with Rasmussen Software and consultant John Huber to develop a custom pilot installation for SWAN's Symphony platform based on their existing Holds Label Solution software. SWAN tested the software and did not include it in their Symphony go-live because of several deal breakers we discovered. These included an administratively heavy licensing model and installation/configuration requirements that required the loss of other print formatting, as well as too much required staff intervention.

Oak Lawn solution

- A staff member at Oak Lawn Public Library (OLPL) developed a homegrown solution in the final days of SWAN ILS migration and decided to make it open source. This software worked for OLPL's local needs but required additional development for broader distribution to other SWAN libraries and other Symphony consortia.
- RAILS began working with this staff member from OLPL to further develop and test the software, which had no documentation and needed usability improvements. However, the collaboration was discontinued when communication and responsiveness issues became insurmountable.
- In the meantime, the software was deployed independently by the OLPL staff member to several other SWAN libraries who contracted with him for support. Though it was not feasible for broader RAILS deployment, we encouraged SWAN libraries to continue using it if it worked for them. SWAN staff recently attempted to work with the source code themselves to explore SWAN-wide deployment and concluded it was not feasible. SWAN is currently pursuing other avenues.

RAILS open source development (25 hours of C# development time—\$4,125)

- RAILS IT staff contracted with a software developer to evaluate, modify, and document the OLPL software with the goal of preparing it for broader deployment within and outside of SWAN. The software included a number of functions that were unrelated to label production and which needed to be removed, and no documentation existed previous to this work. Though progress was made on those two points, RAILS and the developer were never able to find and modify the area of the software which contained and would need to allow for modification of the library codes. This would be a necessity for testing deployment to any library outside of SWAN. The OLPL staff member was unresponsive to inquiries about this after several attempts.

Testing with other consortia

RAILS worked with staff at several other consortia to explore whether their ILS software could produce a label that met the RAILS specs, with results as follows:

- Pinnacle (Polaris)—not able to meet specs natively; feasibility of custom development of a third party tool for Polaris was not explored
- PrairieCat (Sierra)—similar native functionality to Millennium
- RSA (Symphony)—not able to meet specs natively or through custom development of the Symphony platform

Conclusions

- Developing a product or suite of products at a RAILS-wide scale involves working with and addressing three significant variables: ILS software platforms, unique ILS configurations, and printer models and drivers. Each of these variables presents many permutations.
- When considering a potential RAILS-wide deployment of any products, or even deployment to multiple consortia, the challenges of scale are considerable at all levels: installation, ongoing

software support, and initial and ongoing ILS configuration changes and updates. We don't have staff resources consistently across RAILS, consortia, and member libraries to reliably commit to maintenance.

- Encouraging broad deployment across RAILS would raise questions from members about printer and paper purchasing costs. Though group discounts are available, a subsidy is likely impossible, and adoption rates would depend entirely on local library budgets and motivation.
- The consortial landscape has changed considerably through the course of this project, and continues to shift. The delivery landscape may soon shift as well, depending on the results of the study currently underway with the Laboratory of Applied Spatial Analysis (LASA) at Southern Illinois University Edwardsville. Software development and related ILS integration and configurations would need to be responsive to these shifts and resulting changes in library and hub codes, making for a challenging environment in which to successfully develop and test new software with already complex deployment requirements.
- Given these issues, RAILS has decided to cease further development and all other work on this project.
- Potential remains at the individual library or consortium level. If libraries or consortia are interested in doing software development for printing delivery labels from their own ILS, Mark Hatch (RAILS Delivery and Facilities Director) can provide delivery label specifications and verify that the labels generated meet delivery requirements.

eRead Illinois Monthly Axis 360 Statistics - October 2017					
Confirmed Libraries					
RAILS	384				
IHLS	23				
Other	2				
Total	409				
Confirmed Libraries by Type					
	Academic	Public	School	Special	Total
RAILS	19	235	123	7	384
IHLS	2	8	13	0	23
Other				2	2
Total	21	243	136	9	409
Adoption Rate by Type (RAILS members only)	15%	57%	22%	4%	30%
	October 2016	October 2017	July 2015 - October 2016	July 2016 - October 2017	PROJECT LIFETIME TOTAL**
Circulation	25,287	32,678	314,770	431,821	746,192
Total Items Added to the collection	513	115	10,464	8,055	35,454

RAILS Networking Events and Member Visits - October 2017

Networking Events			
Event	Date	Location	Attendance
RAILS networking event at Governors State University	October 2, 2017	University Park	18
Member Visits			
Library Name	Date	Location	Library Type
Galesburg Public Library	October 3, 2017	Galesburg	Public
Westmont Public Library	October 5, 2017	Westmont	Public
Saint Mark Catholic School Library	October 13, 2017	Peoria	School
Messenger Public Library of North Aurora	October 17, 2017	North Aurora	Public
Town and Country Public Library District	October 18, 2017	Elburn	Public
Trinity Christian College	October 18, 2017	Palos Heights	Academic
Bushnell Public Library District	October 19, 2017	Bushnell	Public
Hampton School District #29	October 19, 2017	Hampton	School
Scott County CUSD #1	October 19, 2017	Winchester	School
Carol Stream Public Library	October 25, 2017	Carol Stream	Public
Mason Memorial Public Library	October 25, 2017	Buda	Public
Vernon Area Public Library District	October 25, 2017	Lincolnshire	Public
Marseilles Public Library	October 26, 2017	Marseilles	Public
Lacon Public Library District	October 27, 2017	Lacon	Public
Rushville Public Library	October 27, 2017	Rushville	Public
Midwest Central HS (Midwest Central CUSD #191)	October 30, 2017	Manito	School
Sherrard Public Library District	October 30, 2017	Sherrard	Public
		Total Visits:	17

October 2017 Continuing Education Events

Event	Date	Locations	Category	Format	Attendance
RDA Cataloging for Video and Sound Recordings	October 3, 2017	Galesburg Public Library	Cataloging	In-person	14
RDA Cataloging for Video and Sound Recordings	October 5, 2017	Westmont Public Library	Cataloging	In-person	22
Assessing and Improving Your Library's Website	October 17 and 24, 2017	Online (GoToWebinar)	Technology	Webinar	68
Compensation Development Through Market Benchmarking	October 25, 2017	Burr Ridge Service Center	Management	In-person	19
		East Peoria Service Center	Skills/Administration	In-person	1
		Aurora Public Library-Santori		In-person	3
		Sycamore Public Library		In-person	2
		Vernon Area Public Library District		In-person	6
		RAILS Live		Online streaming	1
Monthly Total					Total: 32
Monthly Total					136